

## AGENDA: FINANCE & INVESTMENT FORUM

[University of Maryland, STAMP Student Union, 3972 Campus Drive](#)

Charles Carroll Room (Rm 2203, second floor)

March 11, 2020

9:00 am - 4:30

**Today** is designed as a forum for constant engagement and discussion with finance coaches. We want you to walk out with an understanding of how the Bay Program can integrate itself better into the financing system; understand what our roles are; and identify who can lead the financing effort individually or collectively on conservation objects.

**Objectives:** To learn about finance, to help finance people learn about the Bay restoration objectives, to understand your role, and evaluate whether finance can affect what you want to do. You don't need to be a finance expert, you simply need to know your area.

9:00-9:05	<b>Introductions and logistics for the day</b> <ul style="list-style-type: none"><li>• Greeting – Dana Aunkst (Chesapeake Bay Program Office Director)</li><li>• Emcee – Jen Cotting (University of Maryland)</li></ul>
9:05 -9:25	<b>In search of cost-effective nutrient loss reductions from the ag sector:</b> <i>The role of pay-for-performance conservation</i> <ul style="list-style-type: none"><li>• Presenter: Jon Winsten (Winrock International)</li></ul>
9:25-10:05	<b>Finance 301</b> <i>A crash course in conservation finance. (This is where you learn the concepts.)</i> <ul style="list-style-type: none"><li>• Definitions of key terms</li><li>• Revenue, Investment Capacity, Market Engagement</li><li>• Identification of enabling conditions</li><li>• Framework for creating financing strategy</li><li>• Presenter: Ashley Allen Jones (i2 Capital)</li></ul>
10:05-10:15	<b>Break</b> <i>Coffee available at The Coffee Bar located in the STAMP building.</i>
10:15-11:10	<b>Oyster Ignite Talks</b> <i>Three short talks highlighting the potential oysters offer for innovative financing.</i> <ul style="list-style-type: none"><li>• Restoration and Ecosystem Services – (Sean Corson, NOAA)</li><li>• Oyster Aquaculture and Fishery (Jason Ruth, Harris Seafood)</li><li>• Innovation (Erik Michelsen, Anne Arundel County)</li></ul> <p><i>After the ignite talks, the finance coaches will be asked for their reactions and how the topics covered in the ignite talks connect to financing.</i></p>

11:10-12:10	<p><b>Meet the Coaches and Application of Learning</b></p> <p>Time reserved for introductions at each breakout table and a brief discussion on how the morning's learning could apply to each breakout table's topic of interest. <i>(This is where you learn from each other).</i></p>
12:10-1:00	<p><b>Working Lunch</b></p> <p><i>Please either bring a bag lunch or stop by the STAMP food court.</i></p>
1:00-1:45	<p><b>Oysters Etc Panel</b></p> <p><i>The panel will provide a report out on how the morning's learning and discussions could be applied to oysters, as well as other environmental outcomes.</i></p> <p><i>There are three marketable tiers to the oyster universe: restoration, public fishery, and aquaculture. The panel will discuss how the specific needs of each of these tiers could connect to financing. This will include ways to kick-off large scale projects with financing strategies, as well as how to support projects after they've started. Some examples of techniques discussed will include marketplace and mitigation techniques.</i></p> <p><i>The audience will be encouraged to engage and ask questions during the panel.</i></p> <ul style="list-style-type: none"> <li>● Moderator: Dan Nees (University of Maryland)</li> <li>● Panelists: Stephan Abel (Ferry Cove Shellfish), Mark Bryer (The Nature Conservancy), David Tepper (Forest Trends)</li> </ul>
1:45-2:00	<p><b>Break</b></p> <p><i>Coffee available at The Coffee Bar located in the STAMP building.</i></p>
2:00-4:00	<p><b>Goal Implementation Team Breakout Sessions</b></p> <p><i>Following the panel, GIT members and finance experts will work together to identify where there may be opportunities for a financing strategy and what type of information would be needed to create such a strategy. A framework to guide the discussion will be provided.</i></p> <p><i>(This is where you understand your role, evaluate where finance can affect what you want to achieve, and engagement with the expert happens.)</i></p>
4:00-4:25	<p><b>Summary of the day</b></p> <p><i>A pulse check on breakout sessions and an introduction to the concept of a Conservation Mutual Fund to bundle different projects together for greater impact.</i></p> <ul style="list-style-type: none"> <li>● Discussion Lead: Jen Cotting (University of Maryland)</li> </ul>
4:25-4:30	<p><b>Conclusion and Next Steps</b></p> <p><i>An overview of how to continue progress after the Forum. We've arranged to have the finance coaches available to you for continued application of learning over the next few months.</i></p>

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- Discussion Lead: Kristin Saunders (Chesapeake Bay Program Office)